



Foreign Agricultural Service

**GAIN Report**

Global Agriculture Information Network

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# Mexico

## Exporter Guide

### Annual

### 2001

Approved by:

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**U.S. Embassy**

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#### **Report Highlights:**

**Mexico is the third largest and one of the fastest growing foreign markets for US agricultural products. In 2000, US exports of agricultural, fish and forestry products reached a record \$7 billion. Consumer-ready exports registered a record \$2.7 billion, up 32 percent. Thus far, through July 2001, consumer-ready products have increased 35 percent.**

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Includes PSD changes: No  
Includes Trade Matrix: No  
Annual Report  
Mexico ATO [MX2], MX

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## Section I. Market Overview

Mexico's economy has recovered from the 1994 peso devaluation and subsequent economic crisis. Between 1996 and 2000, Mexico achieved annual economic growth of 5.5 percent, and retail sales increased almost 5 percent annually. In addition, in December 2000, Mexico elected for the first time in 70 years a President from a different political party. This election and the subsequent peaceful transition of power demonstrates Mexico's stronger position as an economic and political power in the Western Hemisphere.

Regardless of Mexico's most recent political and economic success, in 2001 Mexico has been effected by the slowdown in the US economy. The GDP growth rate is projected to be close to zero in 2001, down from a growth rate of 6.9 percent in 2000 (the highest rate since 1981). Industrial production is the sector most effected by the US slowdown, decreasing over 3 percent in May 2001 as US companies continue to reduce their output. However, thus far, consumption of retail and food products has been less affected by the general economic slowdown.

Despite the general macroeconomic slowdown in 2001, the value of US consumer-ready food products exported to Mexico continues to grow.

- In 2000, US exports of consumer-ready products reached a record \$2.8 billion.
- From January to July 2001, US exports of consumer-ready products registered approximately \$1.8 billion, up 35 percent from the same period in 2000.
- Edible fish product exports for the first seven months of 2001 are up 56 percent in comparison with the same period last year.
- The following consumer-ready product categories will reach record export levels in 2001 if trends from the first seven months of this year continue: pet foods, snack foods, dairy products, fresh vegetables, processed fruits and vegetables, tree nuts, and wine and beer.

Women continue to join the workplace in larger numbers, which leads to increased demand for consumer-ready food products. Almost four in ten women (15 or older) work outside the home, up from three in ten in 1990. This figure is generally higher in the eight cities in Mexico with populations of over 1 million. About 50 percent of Mexico's population is between 15 and 44, a population that is moving to the cities in greater numbers, and is purchasing a larger proportion of their food requirements at large retail markets and convenience stores. These retail businesses represent the best sales venues for US exporters. Traditional markets still have a large market segment, but are not as viable of an option for imported products because of their comparatively small size and limited storage and refrigeration space.

***Advantages and Challenges for US Exporters in Mexico***

<b>Advantages</b>	<b>Challenges</b>
<ul style="list-style-type: none"> <li>— The majority of tariffs on agricultural products will be 1-3 percent by 2002, and zero by 2003 because of NAFTA</li> <li>— Mexican consumers recognize US brands and labels and associate US made products with high quality and value</li> <li>— The US has strong reputation for consistency of the quality and supply of US products among the retail chains</li> <li>— Population in urban centers is growing and the rate of employment among women is continuing to grow</li> <li>— Proximity to US market keeps transportation costs to Mexico low</li> <li>— The Mexican peso continues to be stable in its relation to the US dollar, making unexpected price fluctuations due to less likely exchange rate changes</li> <li>— Growth in almost all sectors of the processed food industry in Mexico, and increased investments from national and international based companies, including from the US, will raise the need for inputs</li> <li>— Mexico is one of the world's principal tourist destinations, with 18.5 million foreign tourists visiting Mexico in 2000 (ninety percent of these tourists come from the United States), and continued growth of the tourist industry raising demand for products for the hotel and restaurant industry</li> </ul>	<ul style="list-style-type: none"> <li>— Mexico has signed 10 trade agreements in the last decade covering 60 percent of the world's GDP, including Europe; thus increasing third country competition</li> <li>— Increasing competition from Mexican food processing companies</li> <li>— Mexican consumers are very price conscious, and imported US processed products in general are, in many cases, 15-40 percent higher in price</li> <li>— Transportation and distribution methods inside Mexico make it difficult to serve and market in multiple regions</li> <li>— Imported products are subject to Mexican quality standards (NOMs) and labeling requirements</li> <li>— Phytosanitary and technical barriers and labeling requirements can cause border crossing problems and delays as Mexican import regulations can change rapidly and without notice</li> </ul>

**Section II. Exporter Business Tips**

### Business culture

Personal relationships are the primary base of Mexican business relationships. Mexicans attach great importance to courtesy in all business endeavors. Many will not want to do business, regardless of the viability of the project, with someone who does not practice general courtesy or is considered rude or disrespectful. A warm handshake combined with conversation about the person's well being, family, or other similar topics prior to launching into any conversation related to business is considered a common courtesy. The concept that "time is money" should be left at the border, and though Mexican businesses are also conscious of the bottom line, courtesy and diplomacy are more important values to most Mexicans than getting immediately "down to business". In the face of a disagreement, Mexicans tend to be skilled at diplomacy and choose to avoid confrontation and loss of face. In a potential confrontation they strive to reach a consensus without having clearly defined winners and losers. These skills of diplomacy are important when approaching all forms of business in Mexico.\*

Personally visit your Mexican clients in Mexico. If a Mexican client visits you in the United States, you are expected to wine and dine him. You will be accorded similar treatment when visiting Mexico.

\*The reference for this section is a book by Eva Kras, Management in Two Cultures, Intercultural Press, Inc, 1995, which provides an excellent comparison of the business cultures in the US and Mexico.

### Entering the Mexican Market

The best way to understand the Mexican market is to visit the marketplace and to talk to buyers, retailers, distributors and other players in order to prepare a more effective entry strategy. US exporters must do their research not only in terms of typical market research, but also finding appropriate business contacts and thoroughly reviewing Mexican import regulations in order to successfully seize market opportunities and overcome market challenges.

US exporters should consider contacting local distributors/importers as an important early step in their efforts to establish themselves in the Mexican market. A good distributor should promote sales and make sure that the imported products are available at points of sale. It is essential to maintain close contact with your representative, especially regarding changes in import procedures and documentation.

An affordable way to investigate the market is to participate in and/or attend Mexican trade shows, particularly US Pavilions organized at selected shows. A show can serve as a way to contact local distributors/sales agents, buyers and businessmen, and to become familiarized with local competition. In the case of new-to-market companies, be prepared to provide support for in-store and media promotions to familiarize consumers with your products. If possible, develop product information/promotional pamphlets in Spanish.

More information is available on specific import regulations in the GAIN Report #MX9097 from 1999. In addition, a GAINS report will be released in October 2001 that will include information on the processes and procedures for exporting products across the US-Mexican border. Furthermore, the US Agricultural Trade Office (ATO) of the US Embassy can provide general market and sector specific information, as well as assist US exporters in identifying trade contacts and developing their marketing strategies in Mexico. See Section V for contact information.

## Section III. Market Sector Structure and Trends

### A. Retail Sector

In 2000, US exports of consumer-ready products to Mexico reached a record \$2.7 billion, of which an estimated 70 percent (\$1.88 billion) were sold through the Mexican retail sector. Highlights of the status of the Mexican retail sector are listed below:

- The Mexican retail market was characterized by moderate sales growth and strong competition during 2000.
- There are approximately 3,638 retail stores in Mexico. This figure includes outlets for the major retail chains, government and convenience stores.
- The sector's retailers invested approximately \$1.8 billion in 2000 to establish new outlets and to increase floor space. Although there is no official estimate currently available for 2001, industry sources estimate that investments will be approximately US \$1.1 to US \$1.3 billion. Only two companies who have announced their investment plans. Wal-Mart will invest US \$464 million over the next 18 months in order to open 62 new outlets, and Comercial Mexicana will invest US \$140 million during the same period.
- In 2000, net sales growth increased for the four leading retailers in Mexico: Wal-Mart, 11.7 percent; Comercial Mexicana, 6.8 percent; Gigante, 8.8 percent; and Soriana, 8.8 percent.
- Retail organizations are anxiously awaiting the outcome of the Government of Mexico's proposal to implement a value added tax (VAT) of 15 percent on food products and pharmaceutical items. Many retailers fear that this tax will seriously restrict consumer spending and have a negative effect on sales for 2001 and beyond. However, in the long run, this may well have a positive effect on the economy, providing the government with needed extra resources.
- Wal-Mart's aggressive entry and now strong position within the market is contributing to future mergers, more direct purchasing, and improved distribution within the retail food sector.

#### Company Profiles of Major Retailers

<b>Retailer Name and Outlet Type</b>	<b>Ownership</b>	<b>Net Sales in 2000 USD Billion</b>	<b>Number of Outlets</b>	<b>Locations City/Region</b>	<b>Purchasing Agent Type</b>
Wal-Mart: Megamarkets, hyper markets, supermarket, clubs, warehouses	Wal-Mart majority US; remaining local	7.8	229	All major cities	Direct purchasing
Gigante: Hyper markets, warehouses & supermarket	Local	2.7	184	All major cities	Direct purchasing, and local distributors
Comercial Mexicana: Hyper markets, megamarkets, supermarkets and warehouses	Local	3.3	168	All major cities	Importers, wholesalers and direct purchasing

Soriana: Hypermarkets, megamarkets and supermarkets	Local	2.7	100	Major cities in Northern and Central Mexico	Direct purchasing
Casa Ley: Hyper, megamarkets and supermarkets	Local	N.A.	95	Northern part of Mexico	Direct purchasing and local distributors
Chedraui: Hyper, Megamarkets and Supermarket	Local	N.A.	49	Major cities in Southern and Central Mexico	Importers and wholesalers
Carrefour: Megamarkets	French	N.A.	17	Only major cities	Importers , wholesalers and direct purchasing

Source.\* Mexican Stock Exchange

Convenience stores are a sometimes overlooked and growing sub-sector of retail sales in Mexico. These stores are located in major and medium sized cities and are primarily located in middle-class neighborhoods and in business districts. Though sales data are not available for this sub-sector, it is believed by owners of retail businesses in Mexico that convenience stores are the fastest growing segment of the retail sector. As in the US these outlets offer a wide variety of products, long business hours, and are known in Mexico for good service. The volume of imported products in the stores is growing and is expected to expand further. Typical imported products in convenience stores include: snacks, candies, pet food, cookies, alcoholic beverages, prepared dinners and cake mixes.

### Company Profiles of Convenience Stores

<b>Retailer Name and Outlet Type</b>	<b>Ownership</b>	<b>Sales in 2000 USD Million</b>	<b>Number of Outlets</b>	<b>Locations City/Region</b>	<b>Purchasing Agent Type</b>
Cadena Comercial Oxxo, Convenient	Amoco Oil Co (US)/FEMSA Comercio (México)	NA	1,487	Large and medium sized cities	Importers and wholesalers
7-Eleven, Convenient	NA	NA	420	Mexico City, Guadalajara, Reynosa, Monterrey and Merida	Direct purchasing
Comextra (formerly 12 +12 stores), Convenient	NA	NA	178	Mexico City and medium size cities	Importers

The only other relevant convenience store chain is Pronto, with 11 stores.

### Competition in supplying products to the retail sector

Local producers are the main suppliers of consumer-ready products. Mexico has a relatively strong food processing industry which supplies most of the country's consumer-ready product needs. For example, of the top 500 companies in the country in 2000, the largest sector is composed of food processing companies (78), with 42 companies in the beverage group. Some of these companies include Grupo Industrial Bimbo (bread products), Nestle (food products in general), Herdez (food products in general), Grupo Industrial Lala (dairy products), Jugos del Valle (canned fruit juices), Grupo Bafar (red meats), Productos del Monte (preserves), Martin Cubero (peanuts), Grupo Mac'Ma (cookies), and Formex-Ybarra (sardines and food ingredients), among others. There are also several American and multinational producers/importers in Mexico, including: Campbell's, Bacardi, Fud, General Mills, Gerber, Kellogg's, Kraft Foods, Procter & Gamble, Frito Lay-Pepsico, Pilgrim's Pride, Purina, and Tyson Foods.

For additional information on the retail sector, please refer to Mexico GAINS report #MX1080, released in June 2001.

## **B. Food Processing Sector**

Mexico's market for processed foods has increased rapidly since 1995, and the local food processing sector has been growing to keep pace; the industry expanded 27 percent between 1995 and 1998. The food processing sector in Mexico offers good opportunities for US suppliers of food ingredients, including seasonings, whey protein, sweeteners, tallow, edible lactose, colorings and flavors, among other products. The import market for these ingredients has grown steadily during the 1990s. For example, it grew from \$28.3 million in 1996 to \$36.3 million in 1998. There are 12,998 registered food processing firms in Mexico with total production of \$23 billion in 1998.

Following are some general characteristics of the Mexican food processing industry:

- *Mexico's agricultural system cannot produce enough to meet domestic demand.* Farms are numerous and small; for example, 2.3 million out of 3.8 million plots are less than 5 hectares. As of 1991, only 40 percent of Mexican farmers used tractors or modern seeds. Yields per acre are extremely low.
- *Food processing facilities range from large, modern facilities to small, mom & pop operations.* Of the 13,000 food processing facilities, only 292 employ more than 250 employees, while the vast majority have fewer than 15 employees. However many of the largest firms can be classified as among the most efficient and mechanized in the world.
- *Packaging is lacking.* Packaging for many products is generally behind that found in the US in terms of attractiveness and convenience.
- *Foreign investment.* Mexico has been a prime destination for foreign investment with almost \$4.2 billion going to the food and beverage processing industry between 1994 and 1998.

### Sector Trends

Mexico's food processing sector is undergoing changes in every aspect of its business. Following are some important trends:

- **Growth in the market in general.** Mexico's food processing sector has expanded at a moderate pace of between five and ten percent, per year, over the last three years. Use of imported ingredients. The US



dominates Mexican imports of whey protein, tallow, edible lactose, seasonings, sweeteners, colorings, and flavors.

- Removal of government controls (milk, tortillas). Mexico has been trending toward liberalizing the agricultural sector, creating new opportunities for foreign companies.
- More processed and frozen foods. More women are working -- according to INEGI, 39.4 percent of the Mexican workforce is made up of women, a three percent increase from 1996. As more women enter the workforce, their families will eat out more often and will turn to prepared meals. Indeed, according to the National Association of Retail and Department Stores (ANTAD), the average number of times Mexicans eat out per month has increased by 67 percent since 1995.
- Bigger stores with more refrigerated, freezer space. Foreign investment in Mexico's retail sector has meant that stores are modernizing and increasing the capacity of their refrigerated and frozen foods sections.
- Foreign investment. Foreign investment is strong, with almost \$4.2 billion dollars going to the food processing sector. The industry is the third most popular for foreign investors, representing 20 percent of total foreign direct investment.
- Investment in capital equipment. Mexican companies are importing roughly \$200 million, per year, in food packaging equipment to increase the efficiency of their operations.

For additional information on the food processing sector, please reference Mexico Gains report #MX1099, released in July 2001.

### **C. Hotel, Restaurant, Institutional (HRI) Sector**

The Mexican food industry is currently the main supplier to the HRI sector and is the major competitor for US products. There are many large companies in food processing which supply products to this sector, including multinational firms such as Bacardi, Campbell's, Del Monte, General Mills, Nestle, and Unilever. US exporters are considered to be suppliers of high quality products and are the leaders in supplying the HRI sector for specific products such as red meat, poultry, and certain dairy products, as well as other niche high-value processed food products.

#### Hotels and Resorts

According to the Mexican Association of Hotels and Motels, the principal trade association of the sector, total foreign investment in the hotel sector increased from eight percent in 1992 to 20 percent in 2000. In 2000, the Mexican hotel industry had 9,650 registered establishments, with almost 420,000 hotel rooms. Most of the leading international hotel chains are in Mexico, including: Hyatt, ITT Sheraton, Westin, Howard Johnson, Four Seasons, Marriot, Nikko, Mission, Best Western, and Presidente Inter-Continental.

The most important tourist destinations in Mexico are Cancun, Mexico City and Los Cabos. With 670 hotels and 47,000 rooms, Mexico City has the largest number of hotels in the country. However, as of 2001, only 55 hotels in the city were classified as International Tourism Quality, with 14,570 room capacity.

#### Restaurants

The Mexican restaurant industry is comprised of 221,427 establishments that contributes 3 percent to Mexico's GDP. The Mexican restaurant industry reported sales of US \$13.5 billion in 2000, an increase of 10 percent over

1999. For 2001, it is estimated that sales will increase 4 to 6 percent. Mexico City has the largest concentration of restaurants with approximately 31,000 establishments (of which 2,500 are International Tourism Quality). The sector is segmented by size: 96 percent are part of the traditional sector, which represent micro and family businesses, while only four percent are considered to be medium and large sized operations. Of the grand total, 19,482 restaurants in Mexico are certified as Tourism Quality.

#### Institutional Food Service Segment

The institutional food service market in Mexico has great growth potential that has been virtually untapped. Although there are no official data available, industry representatives estimate that the institutional market prepares around six million meals, per year. Currently, this market segment is not purchasing imported food products but, with the changes in the food service industry, this could change in the medium-term. This market is basically composed of two types of companies: those which provide meal preparation services under contract/concession, and those companies which prepare their own meal needs for their respective staff.

There are approximately ten institutional companies that control 65 percent of the contract/concession sector. This segment is more active and has greater growth potential. On the other hand, the number of companies which prepare their own meals is also very large, has a captive clientele, and also offers interesting export opportunities for US food producers in the near future.

The institutional market is concentrated in Mexico City and its metropolitan area, as well as the State of Mexico, Monterrey, Ciudad Juarez, Tijuana, Mexicali and other major industrial cities.

For additional information on the HRI sector, please refer to the Mexico GAINS report which will be released in October 2001. Please contact the ATO Mexico City for the GAINS report number.

### **Section IV. Best High Value Product Prospects**

The Mexican market is open to most U.S. food products, but the following are some products that demonstrate excellent potential :

- L Meat. Mexican buyers, particularly those in the hotel industry, suggest a strong demand for high quality US meats such as Angus, Rib Eye, and New York Strip.
- L Fish and Seafood. Buyers suggest that fish, especially salmon, and seafood products, particularly Alaskan King Crab and lobster, also present lucrative opportunities.
- L Frozen Deserts. Deserts, specifically high quality ice creams present strong possibilities.
- L Sauces. Pre-made sauces, particularly dressings and salsas, are solid prospects.
- L Snack Foods. Although there is strong competition in snack foods from Mexican manufacturers, the snack food industry has solid potential. Pringles and Anderson Pretzels are two examples of imported products that have succeeded.
- L Healthy Foods. Nearly every interviewee suggested that the strongest trend in the market is towards "light" food.
- L Food Ingredients. Additives such as fat substitutes and artificial sweeteners may show particular promise in the near future.

**L. Wine.** US wines currently have a 9 percent share of Mexico's import market for wine. Opportunities exist for the aggressive marketer.

## **Section V. Key Contacts and Further Information**

The primary mission of the US Agricultural Trade Office (ATO) in Mexico City is to assist in the market development and promotion of US food and agricultural products in the Mexican market. There are a wide variety of activities and services that the ATO, along with other private sector representatives called "cooperators," make available to help develop US agricultural interests in Mexico. If you have any questions or comments regarding this report or need assistance exporting US food and beverage products to Mexico, please contact the ATO in Mexico City at the following address:

### **US Agricultural Trade Office**

Jaime Balmes No. 8-201  
Col. Los Morales Polanco  
11510 Mexico, DF  
Tel: (525)-280-5291, 280-5277, 281-6588 Fax: (525)-281-6093  
email: [atomexico@fas.usda.gov](mailto:atomexico@fas.usda.gov)  
website: [www.fas.usda.gov](http://www.fas.usda.gov).

### **Regional U.S. Agricultural Trade Office**

Monterrey, Mexico  
To be opened by December 1, 2001  
Please call ATO, Mexico City for contact information

### Cooperators

#### **American Peanut Council**

Cerrada La Otra Banda #58-4; Col. Tizapán San Angel  
01090 México, D.F.  
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Contact: Ma. Cristina Compean, Director

#### **American Soybean Association**

Jaime Balmes 8-201; Col. Los Morales Polanco  
11510 México, D.F.  
Mexico  
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[Asamex@mail.internet.com.mx](mailto:Asamex@mail.internet.com.mx)  
Contact: Mark Anderson, Director

**Grupo PM**

(Local representative of several horticultural cooperators)

Calle Brisas de Tampico #14

Frecc. Las Brisas de Cuernavaca

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Mexico

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Contact: Luis Moreno, Director

**National Sunflower Association**

José Ma. Rico #212-702; Col. Del Valle

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Mexico

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Contact : José Luis Escamilla, Director

**USA Poultry and Egg Export Council**

Jaime Balmes 8-201; Col. Los Morales Polanco

11510 México, D.F.

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Tel: (011)(52) 5282-0933/42/46; Fax: (011)(52) 5282-0952

luispo@prodigy.net.mx

Contact: José Luis Cruz, Director

**U.S. Dairy Export Council (USDEC)**

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usdecMex@dfi.net.mx

Contact: Larry Solberg, Director

**U.S. Grains Council**

Jaime Balmes 8-201; Col. Los Morales Polanco

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usgc@grains.org.mx

Contact: Dr. Ricardo Celma, Director

**U.S. Meat Export Federation**

Jaime Balmes 8-201; Col. Los Morales Polanco  
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mskalicky@uswheat.org

Contact: Mitchell J. Skalicky, Director

Trade Associations

**American Chamber of Commerce in Mexico**

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email: [www.usmoc.org](http://www.usmoc.org)

**Asociacion de Agentes Aduanales de Nuevo Laredo, A.C.**

(Trade Association of Customs Brokers of Nuevo Laredo, A.C.)

Ave. Cesar López de Lara 3603

Nuevo Laredo, Tamps. C.P. 88280

México

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e-mail: [fmejia@aduanet.org](mailto:fmejia@aduanet.org)

Contact: A.A. Fernando Mejia Arreola, President

**Mexican Association of Restaurants (AMR)**

Torcuato Tasso 325-103

Col. Polanco

11560 Mexico DF

Tel: (011) (52) 52-50-11-46, 55-31-09-11; Fax: (011) (52) 55-45-86-71

**National Association of Supermarkets and Retailers (ANTAD)**

Homero 109 Piso 11

Col. Polanco

11560 Mexico DF

Tel: (011) (52) 5545-8803, or 52-54-17-14 Fax: (011) (52) 52-03-44-95

**National Association of Grocers**

Tolsa 54

Col. Centro

CP 06040 Mexico DF

Telephone: (011) (52) 5709-3697,

**National Chamber of the Industry of Restaurants and Food (CANIRAC)**

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Contact: Dr. Javier Trujillo, Director in Chief

**Secretaria de Salud y Asistencia**

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(Ministry of Health and Public Assistance; General Directorate of Sanitary information)

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Contact: Sra. Berta Hernández, Information Director

## Appendix I. Statistics

**Table A. Key Trade and Demographic Information**

Agricultural Imports from All Countries	\$8,645 million
US Market Share (1)	76 percent
Consumer Food Imports from All Countries (1)	\$3,524 million
US Market Share (1)	70 percent
Edible Fishery Imports from All Countries (1)	124 million
US Market Share (1)	26 percent
Total Population/Annual Growth Rate (2)	97.483 million/ 1.53 percent
Urban Population	74.7 million
Number of Metropolitan Areas (3)	8
Size of the Middle Class (4)	31 percent of total population
Per Capita Gross Domestic Product	\$5,780
Unemployment Rate	2.3 percent
Percent of Female Population Employed (5)	39.4 percent
Exchange Rate	US\$1 = \$9.5 Mexican Peso (9/01)

### Footnotes

(1) United Nations Statistical Data

(2) Figures from 2000, but average growth rate from 1990-2000 was 1.9 percent; figures from INEGI

(3) Population in excess of 1,000,000; in order from largest: Mexico City, Guadalajara, Monterrey, Puebla, Leon, Toluca, Ciudad Juarez, Tijuana

(4) This measurement is from 1996, measuring the percent of the population in the middle two income brackets

(5) Percent against total number of women (15 years old or above), Source: INEGI, 1997

**Table B. Consumer Food & Edible Fishery Product Imports****Mexico Imports**

(In Millions of Dollars)

	Imports from the World			Imports from the U.S.			U.S Market Share		
	1997	1998	1999	1997	1998	1999	1997	1998	1999
<b>CONSUMER-READY AG TOTAL</b>	<b>2,810</b>	<b>3,119</b>	<b>3,524</b>	<b>1,899</b>	<b>2,253</b>	<b>2,460</b>	<b>68</b>	<b>72</b>	<b>70</b>
Snack Foods (Excl. Nuts)	101	130	171	61	75	96	61	58	56
Breakfast Cereals & Pancake Mix	30	28	27	29	28	24	98	97	90
Red Meats, Fresh/Chilled/Frozen	595	759	879	533	689	751	89	91	85
Red Meats, Prepared/Preserved	94	99	102	90	94	96	95	95	95
Poultry Meat	245	226	199	244	226	196	100	100	99
Dairy Products (Excl. Cheese)	546	471	442	117	146	142	21	31	32
Cheese	81	83	99	22	24	25	27	29	25
Eggs & Products	39	49	23	37	48	22	95	98	98
Fresh Fruit	166	188	268	129	128	195	78	68	73
Fresh Vegetables	63	67	70	58	61	57	92	92	81
Processed Fruit & Vegetables	163	192	242	105	140	158	64	73	65
Fruit & Vegetable Juices	11	12	20	8	10	15	77	80	74
Tree Nuts	34	41	56	29	37	48	86	90	85
Wine & Beer	60	60	76	23	24	28	38	40	37
Nursery Products & Cut Flowers	43	40	43	31	29	32	72	73	74
Pet Foods (Dog & Cat Food)	40	58	67	39	57	66	99	99	99
Other Consumer-Oriented Products	501	615	740	344	435	508	69	71	69
<b>FISH &amp; SEAFOOD PRODUCTS</b>	<b>72</b>	<b>85</b>	<b>124</b>	<b>30</b>	<b>32</b>	<b>32</b>	<b>42</b>	<b>38</b>	<b>26</b>
Salmon	5	4	5	1	1	1	23	20	18
Surimi	1	1	1	1	1	1	61	22	59
Groundfish & Flatfish	13	16	19	5	4	7	34	23	36
Molluscs	7	14	9	3	3	4	41	25	42
Other Fishery Products	46	50	90	20	23	19	46	48	19
<b>AGRICULTURAL PRODUCTS TOTAL</b>	<b>7,940</b>	<b>8,657</b>	<b>8,645</b>	<b>5,946</b>	<b>6,689</b>	<b>6,569</b>	<b>75</b>	<b>77</b>	<b>76</b>
<b>AG., FISH &amp; FORESTRY TOTAL</b>	<b>8,456</b>	<b>9,268</b>	<b>9,385</b>	<b>6,355</b>	<b>7,155</b>	<b>7,076</b>	<b>75</b>	<b>77</b>	<b>75</b>

Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office



**Table C. Top 15 Suppliers of Consumer Foods & Edible Fishery Products****Mexico -Top 15 Suppliers**

CONSUMER-READY AGR. IMPORTS				
	(\$1,000)	1997	1998	1999
United States		1899291	2252989	2459678
Canada		77979	117791	178610
Chile		75831	100652	152115
New Zealand		152465	144827	131488
France		68928	60759	57770
Netherlands		40881	51297	56441
Australia		43898	56060	53761
Germany		124936	48352	52743
Spain		31458	31281	37030
Ireland		36562	21128	35030
Argentina		7014	16947	28487
United Kingdom		53050	19199	27866
Sri Lanka		25675	28889	27595
Denmark		18544	16220	25918
Brazil		17051	20118	20993
Other		136437	132826	178102
World		2810041	3119372	3523668

FISH & SEAFOOD PRODUCTS IMPORTS				
	(\$1,000)	1997	1998	1999
Ecuador		3543	6971	41200
United States		30473	32091	32251
Chile		5636	7717	7540
Norway		3598	4653	5503
Spain		3404	3318	5052
Taiwan (Estimated)		203	2223	4506
Canada		4609	3979	3722
Argentina		4625	5051	3130
Venezuela		1967	469	2845
Peru		428	3424	2370
China (PR)		1440	1754	2119
Korea, Republic of		1024	1508	1959
India		624	1655	1749
Thailand		3430	646	1336
Philippines		653	1524	1095
Other		6301	8158	7728
World		71964	85148	124117

Source: United Nations Statistics Division